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Canada

Retail Food Sector

Eastern Canada Retail Food Sector Report

2000

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Report Highlights:

The NAFTA continues to facilitate the export of U.S. high value food products into the Eastern Canadian retail market. While the Canadian market exhibits many similar characteristics to domestic markets, many factors such as different labeling laws and methods of distribution must be accounted for by potential U.S. exporters. Sales of grocery items at the retail level continue to increase, and demand is growing for products that are high in quality, nutritional value and offer unique flavors. Best opportunities exist for ethnic foods, value-added frozen entrees, value-added fresh produce and frozen seafood.

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Section 1. - Market Summary- Eastern Canada

The Canadian grocery retail industry can be characterized as appearing very similar to its U.S. counterpart. Canadian grocery retail stores are laid out in the same patterns as American outlets and they stock many of the same products. On average, Canadian consumers behave similar to Americans, and a majority of Canadian and U.S. citizens share a common English language.

However, there are substantive differences that U.S. exporters of high value foods must account for in order to successfully enter the Canadian marketplace. Despite the numerous similarities between Canada and the U.S., it is vital that potential American exporters recognize that as a sovereign state, Canada exercises its own laws and regulations relating to trade goods. Many of these laws are separate and distinct from U.S. practices.

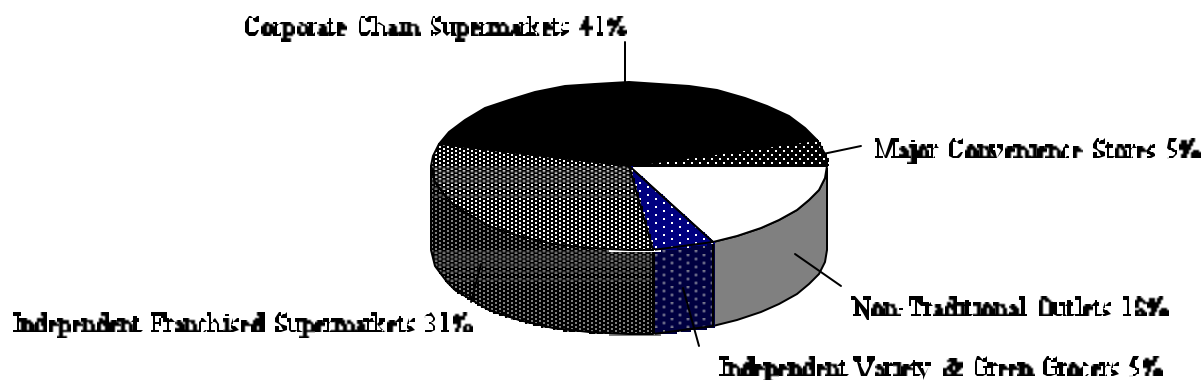
Nevertheless, the Canadian market clearly provides an excellent opportunity for American high value foods. The North American Free Trade Agreement (NAFTA) continues to facilitate the export of U.S. goods into Canada. With a majority of Canada's 30 million citizens residing within 100 miles of the U.S. border, American producers are within easy reach of a large export market. Canada enjoys one of the world's highest standard of living, making it an ideal target market for innovative food and grocery products.

Consumers of Eastern Canada – Ontario, Quebec and Atlantic Canada (Nova Scotia, New Brunswick, Prince Edward Island and Newfoundland) have a per capita disposable income of \$11,705 (US), and spend an average \$1,228 (US) per person in retail food stores, each year.(Canadian Grocer Magazine, Who's Who Annual Directory, 1999-2000) Residents of this region account for approximately 66.3% of the Canadian grocery retail market.

Three urban centers - Toronto, Ottawa and Montreal - account for a significant proportion of Eastern Canada's population and grocery retail sales. Canada's largest city -Toronto, Ontario has a population of approximately 4.6 million (an increase of 3.7 % from 1997). Toronto is one of the world's most ethnically diverse cities. An estimated 42% of Canada's 3 million immigrants and visible minorities reside here (Canadian Grocer 1999 Executive Report). Toronto accounts for approximately 13% of the Canadian grocery retail market with food store sales reaching approximately \$4.8 (US) billion in sales.

The nation's capital, Ottawa (including Hull, Quebec) is home to over 1 million residents. This center accounts for over \$1.1 billion (US) in grocery retail sales, or nearly 3% of Canada's total grocery sales.

1998 Canadian Grocery Retail Sales



In 1998, Canada's traditional grocery outlets (i.e. supermarkets, grocery stores, convenience stores and gas marts) accounted for total sales at retail of \$36.4 billion (US). A growing trend since the mid-1990s has been an increase in sales of grocery products through non-traditional outlets (mass merchandisers, warehouse club stores, drug stores, etc.). These outlets have increased their share of the Canadian "all grocery sales at retail" market segment from 11% in 1990 to nearly 18% in 1998. Combined, their sales of grocery products add another \$7.9 billion (US) in sales.

Despite this increasing competition from mass merchandisers, warehouse club and drug stores, the traditional grocery industry in Canada has continued to expand. Since 1994, sales through traditional grocery outlets have increased by more than 13%.

Five-Year Sales Trends - Traditional Retail Outlets			
Year	Retail Chains	Major Convenience Stores	Independents
1994	33,650,200	18,002,800	15,647,400
1995	33,904,400	18,274,500	15,630,000
1996	33,736,300	18,690,000	15,046,400
1997	35,624,600	19,878,500	15,746,000
1998	36,950,300	21,129,300	15,821,000
1999 (est.)	38,132,700	22,040,700	16,092,000
*Total sales in \$000s (US)			

Source: Canadian Grocer Magazine, "Who's Who - Annual Directory, 1999-2000."

Section 2. - Market Entry

Within the past several months, the Canadian grocery retail industry has undergone drastic structural changes similar to those experienced in the United States. Retail consolidation has had the effect of concentrating the market share with a minority of large grocery retail outlets. In Canada the result is much more pronounced than with its U.S. counterparts. Whereas in the U.S. the top five grocery retailing firms account for about 45% of all U.S. grocery sales, in Canada the top five account for 70% of traditional grocery sales and 58% of all grocery sales at retail. In fact, Canada is characterized by having just six major grocery retailing firms for the entire country, plus about two dozen smaller regional firms. An aggressive building and renovation schedule carried out by large corporate chains has also contributed to their increasing market share at the expense of independents. Small independents have been particularly hard hit.

Top Eastern Canadian Grocery Retail Chains

Distributor	Head Office	Ownership	Stores	Est. sales (USD)
Loblaw Companies Ltd.*	Toronto, ON	Canadian	1,859	11,724,138,000
Sobeys Inc.*	Stellarton, NB	Canadian	1,392	6,896,551,700
Metro Richelieu**	Montreal, PQ	Canadian	1,150	2,413,793,100
Great Atlantic & Pacific Co.*	Toronto, ON	U.S.	233	1,724,137,900
Couche Tard*	Laval, PQ	Canadian	1,574	632,413,790
7-Eleven*	Burnaby, BC	U.S.	476	604,137,930
Northern Sores*	Winnipeg, MB	Canadian	185	433,793,100
Co-op Atlantic***	Moncton, NB	Canadian	116	310,344,830
A. de la Chevotiere**	Rouyn-Noranda, PQ	Canadian	64	117,241,380

*Locations across Canada

**Locations in Quebec only.

***Locations in Atlantic Canada only, affiliate of Western-based Federated Co-operative.

Source: Canadian Grocer Magazine, "Who's Who - Annual Directory, 1999-2000."

Major Canadian Grocery Retail Chains In Eastern Canada

Chain	# of Corporate Stores	# of Franchised Stores
Loblaw Companies Ltd.	781	1,078
Sobeys Inc.	265	943
Metro-Richelieu	35	1,038
Great Atlantic & Pacific Co.	176	57

Source: Canadian Grocer Magazine, "Who's Who - Annual Directory, 1999-2000."

Major Eastern Canadian Regional Grocery Retail Chains			
Chain	Head Office	# of Stores	Locations
Co-op Atlantic	Moncton, NB	116	Atlantic Canada and Quebec
Fortino's Supermarkets*	Hamilton, ON	19	Ontario
Coleman's Food Centres	Corner Brook, NF	12	Newfoundland
Commisso's Food Markets	Beamsville, ON	12	Ontario
Longo Bros. Fruit Markets	Mississauga, ON	10	Ontario
Knob Hill Farms	Scarborough, ON	9	Ontario
L&M Food Markets	Fergus, ON	8	Ontario
*A division of Loblaw Companies Ltd. of Toronto, Ontario			

Source: Canadian Grocer Magazine, "Who's Who - Annual Directory, 1999-2000."

Major Eastern Canadian Convenience Store Chains			
Chain	Head Office	# of Stores	Locations
Couche-Tard	Laval, PQ	1574	Across Canada
Silcorp Limited	Scarborough, ON	929	Western Canada and Ontario
7-Eleven	Burnaby, BC	476	Western Canada and Ontario
Imperial Oil	Toronto, ON	271	Across Canada
Shell Canada	Calgary, AB	488	Across Canada
Irving Convenience Stores	Saint John, NB	130	Quebec and Atlantic Canada
Hasty Market	Oakville, ON	106	Ontario
Avondale Stores	Jordan Station, ON	121	Ontario
Good Neighbor	Mount Pearl, NF	120	Newfoundland
Petro-Canada	Mississauga, ON	406	Across Canada

Source: Canadian Grocer Magazine, "Who's Who - Annual Directory, 1999-2000."

Such concentration of retailing buying power creates a paradox for potential exporters – both simplifying and complicating the process of entering the Canadian market. If the aspiring exporter is capable of supplying the entire Canadian marketplace, it needs only to make sales calls on five major retail buying offices (See Appendix A for Canadian grocery retailer contact information). However, unless the product is truly innovative and unique to Canada, retail buying offices may demand a listing allowance (slotting allowance). Depending upon the item or commodity, such charges can range from \$2,000 (US) for a regional purchase, to over \$70,000 (US) for a national listing.

It is possible for a manufacturer to negotiate a reduction in listing fees by proving a strong consumer demand for his products and promising a consumer marketing campaign. For small and medium-sized manufacturers that cannot supply the entire Canadian marketplace, or which are unwilling to take on such an onerous task initially, there are alternative approaches to enter the Canadian marketplace.

- Approach large retailing firms on the basis of regional or local distribution only.
- Contact one of the big retailing firms with a request to test market a product in a limited number of stores (perhaps five to 10).
- Approach one of the regional retailing firms.
- Individually approach a few of the small, independent grocery retail firms.
- Contact individual specialty food retailers.

Another excellent opportunity for potential U.S. suppliers is through Canada's sophisticated private label programs. Canada is vastly ahead of the U.S. in the development of quality private label products and closely resembles the British retail industry's model of building closer or exclusive business relationships with manufacturers. Private label products represent 25% of Canadian grocery sales, compared to just 18% in the U.S. Every major Canadian grocery chain and most regional chains have well-developed private label programs. Canadian private label buyers normally want to work closely with their suppliers to create new, unique-tasting and nutritious products. The world famous *President's Choice*™ private label products were created in Canada and distributed through Loblaw Companies Ltd..

Whichever method is chosen, it is highly advisable for U.S. manufacturers to have a Canadian based broker/distributor to make retail sales calls on their behalf. Broker/distributors have professional sales forces who understand the retail food sector and its various peculiarities. A study by Canadian Grocer Magazine illustrated that U.S. manufacturers were 10 times as likely to succeed in marketing their products in Canada if they worked through a Canadian broker. Potential U.S. exporters can contact Canadian brokers through the Canadian Food Brokers Association:

58 Meadowbrook Lane, Suite 100

Unionville, Ontario

L3R 2N9

Tel: (905) 477-4644

Fax: (905) 477-9580

Web: www.cfba.com

By Canadian law, any product selling en masse in the country must have bilingual (French and English) labeling. The only way around the labeling law is to do a limited test market in Canada for a limited period of time. Labeling information is available from any Canadian Consulate in the U.S. In addition, Canadian broker/distributors are well experienced with Canada's labeling regulations, and with customs regulations.

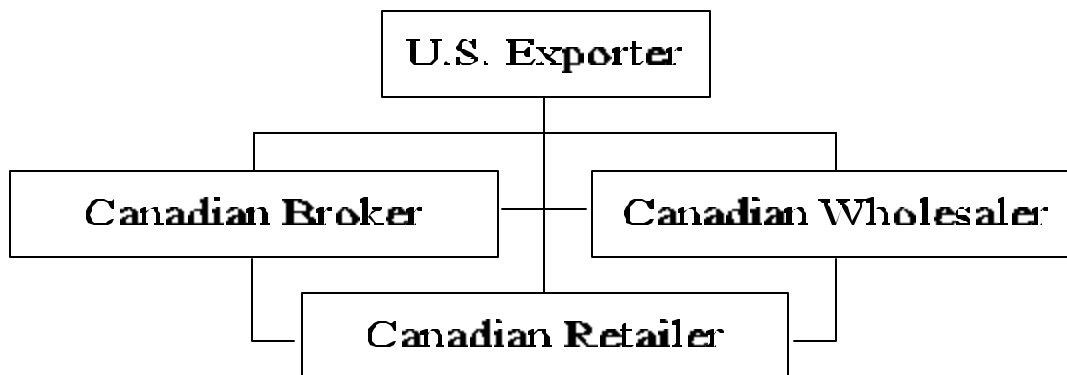
Canada is also a metric nation, meaning all weights and measures must be shown in metric. Soft metric (or straight conversion from Imperial measures to metric) is acceptable.

The path on which imported food products travel to reach Canadian retail markets will differ slightly according to a) the nature of the product, and b) the nature of the retail outlet. Perishable goods such as value-added produce items (washed, cut and packaged), dairy products, meat, poultry and eggs have an abbreviated shipping route, often bypassing wholesale firms or long storage periods in warehouse facilities. Canadian food brokers often arrange shipping from U.S. suppliers directly to retail distribution centers.

Non-perishable food items such as canned or dried goods do not have the same impetus for rapid delivery as perishable items. However, they do have a relatively short route of distribution due to a lack of wholesale firms in Canada.

In Canada, because of this lack of wholesaling operations, the function of supplying inventory falls almost completely under the control of large retail chains. Retailers listed in the previous tables conduct a substantial portion of their sales to supply franchised and independent retail outlets through their wholesale divisions.

The Canadian Grocery Retail Market Structure



Canadian food brokers are commissioned to represent imported grocery items, facilitating their entry and distribution to the Canadian retail market. Many offer value-added services such as marketing and logistical support.

Once purchase agreements are reached, food items are shipped from the U.S. supplier to public warehouse facilities, one of the few wholesale firms operating in Canada, or directly to a major retailer's distribution center. In a few cases, brokers will arrange shipment of food items to franchised or independent retail outlets.

New technologies are now allowing retailer to communicate directly with foreign and domestic suppliers. Computer category management and continuous product replenishment software programs, along with Internet sales allow for this closer working relationship. To eliminate further operating expenses, such as long-term storage of goods, retailers are increasingly utilizing 'just-in-time' deliveries, replenishing their inventory directly from suppliers as their needs arise.

Large retail chains distribute grocery items to stores within their respective chains, franchised outlets and independent retail stores. Franchised and independent retail outlets also receive inventory through brokers and wholesale firms.

Retail chains prefer to purchase their grocery inventory directly from suppliers, whether they are domestic or foreign. Often, chains will employ the talents of brokers, field agents and distributors for new food items, for their knowledge of specific products, or to test the viability of a given food product for the retailer's shelves to optimize the number of stock keeping units (SKUs) in each store and distribution.

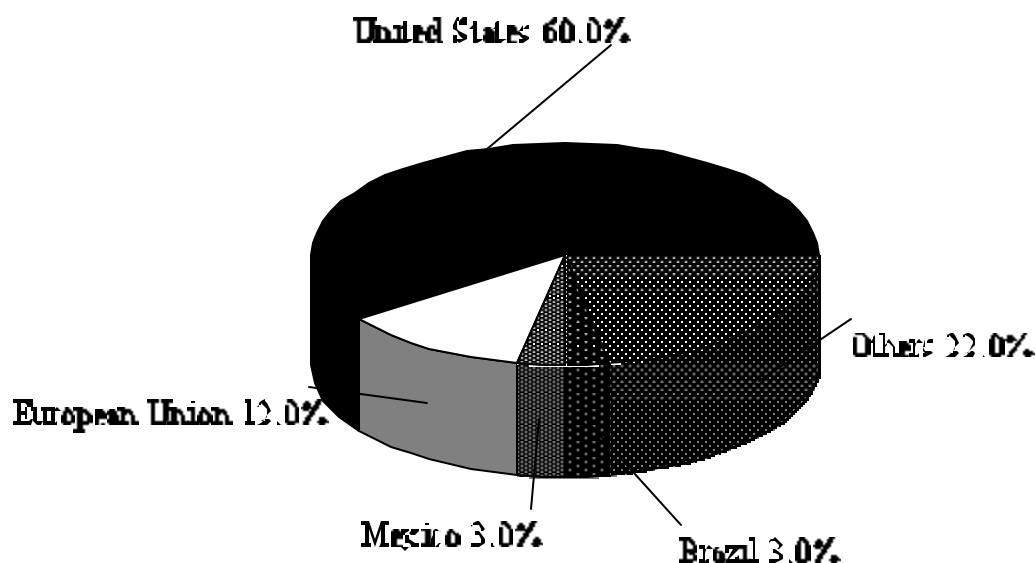
Section 3. - Competition

Like the U.S., Canada is a modern, industrialized and wealthy nation. This implies Canadian supermarkets are already stocked with the widest range of product possible. The average Canadian supermarket currently contains 17,000 stock keeping units (SKUs) of product. This can complicate the introduction of new products. As a result of industry consolidation there are fewer retail distributors. In the pursuit of administrative and financial efficiencies, retailers have attempted to limit their operating expenses by reducing their number of SKUs.

A vital selling point to Canadian retail buyers is the presentation of a totally innovative product, a new and healthier product, or a product that is either superior quality to those already on the shelves or a product that is substantially less expensive.

As the United States' second largest trading partner for agricultural products, Canada has access to a majority of the same grocery items as Americans do. In 1998, Canada imported nearly \$7 billion (US) worth of agri-food products from the U.S., compared to approximately \$4.4 billion from 70 other countries.

1992 Canadian Agri-Food Imports



A potential barrier to entering Canada is a series of quotas Canada imposes on some product categories to protect its own producers. Examples of categories affected are milk products, eggs, and some poultry products. A certain level of market access for these commodities has been granted through bilateral and multilateral negotiations, and the U.S. will continue to seek improved market access through the World Trade Organization (WTO). For further information on current Canadian trade and economic policies, refer to the Export and Import Controls section of the Canadian Department of Foreign Affairs and International Trade (DFAIT) web site (www.dfait-maeci.gc.ca). Further information on specific commodities can be obtained by contacting:

Richard Bertrand (Dairy Products) - (613) 996-2594

Keltie Findlay Leclair (Eggs) - (613) 996-4333

Daniel Kane (Poultry) - (613) 995-7765

Section 4. Trends in Canada

The reality of the Canadian consumer market is that people have increasingly busy professional and personal lives. Convenience and time-saving qualities are increasingly sought by North American consumers when shopping for food items. Canadians also expect quality food items and have demonstrated a willingness to pay more for value-added and premium grocery products. This is supported by the fact that items such as premium, value-added frozen dinners increased in sales by 8% in 1998 (Food In Canada, September 199-2000).

Consumer Trends

Foreign Flavors - Ethnic foods continue to grow in popularity with Canadian consumers. Factors such as a Canada's growing immigrant population, the consumer's demand for variety, frequent international travel and exposure to popular American ethnic food trends affect the expansion of this product category. Italian, Asian (including Chinese, Thai, Indian, and Japanese), West-Indian, African, Middle Eastern, Greek, Portuguese, Spanish, Mexican, South American and Cajun are the most popular tastes and flavors sought by Canadians. A caveat relating to this category is Canadian grocery stores already have a wide selection of popularized ethnic food items such as Mexican salsas, or Italian tomato sauces.

Functional Foods and Fresh Produce - Nutritional and functional foods are another food category that is expected to grow within the Canadian grocery retail industry. An increasing amount of Canadian consumers are concerned with maintaining a healthy lifestyle and seeking foods that are lower in fat and cholesterol, but continue to offer appealing flavor (Canadian Grocer 1999 Executive Report). Foods that have demonstrated disease-fighting capabilities, including soybean products continue to grow in popularity as well.

Canadians consume greater quantities of fresh fruits and vegetables than their American counterparts. The average Canadian eats an estimated 490 lbs. of fruits and vegetables in one year, compared to about 204 lbs. consumed by the average American (Statistics Canada, www.statcan.ca and Produce Marketing Association, "U.S. Fresh Produce Industry Consumption Statistics and Trends, 1998"). This has led to an increasing demand in Canada for fresh fruits and vegetables. Canada grows much of its own produce, but because the growing season is short (perhaps six months) there is opportunity for U.S. producers to sell fresh produce in Canada during Canada's non-growing season (November to June). Canada's northern climate also prevents the growing of many popular produce items such as citrus fruits. Currently, some 45% of produce sold in Canadian supermarkets come from the U.S. Fruits and vegetables which are merchandised as pre-washed, pre-cut and pre-packaged are growing in popularity with Canadian consumers.

Seafood - particularly frozen seafood, is another product category in demand in Canada. While Canada is a prime producer of seafood, much of it for export, declining seafood stocks in nearby waters has caused Canada to increase its imports of seafood every year for the past five. Any new and interesting varieties or flavor of seafood should be of interest to Canadian buyers.

Home Meal Replacements - or meal solutions may offer an opportunity for U.S. exporters if they can provide a tasty, nutritious and well-priced meal for the Canadian marketplace. While meal solutions are not nearly as well developed in Canada as they are in the U.S., they are growing slowly. The challenge facing home meal replacements in Canada is a more pronounced European cultural influence. Canadians still demonstrate a preference to spend more time at home, preparing their own meals than Americans ("Speaking of Food and Eating - A Consumer Perspective," The Canadian

Foundation for Dietetic Research, Dieticians of Canada and Kraft Canada). The average Canadian spends approximately 16% of their total food budget on meals outside the home, compared to 24% spent by the average American (Canadian Grocer 1999 Executive Report).

Furthermore, the Canadian government currently enforces stringent regulations on the import of certain fresh food products such as poultry and eggs. Any high value food products such as home meal replacements that include these fresh products will face the scrutiny of Canadian food import laws.

Section 5. Summary

Exporting High Value Foods to the Canadian Grocery Retail Market	
Advantages	Challenges
<ul style="list-style-type: none"> • Canada has an affluent and highly educated population. 	<ul style="list-style-type: none"> • Food products need to be higher in quality, sophistication and uniqueness.
<ul style="list-style-type: none"> • Canada has one of the world's highest standards of living. 	<ul style="list-style-type: none"> • Canadians already have a great variety of food products available to them
<ul style="list-style-type: none"> • Canadian consumers behave similarly to American. 	<ul style="list-style-type: none"> • Exporters must abide by separate and distinct Canadian laws and regulations (i.e. packaging, nutrition, metric measurement and language).
<ul style="list-style-type: none"> • There are fewer retailers to approach when soliciting listing agreements. 	<ul style="list-style-type: none"> • Consolidation of retailers has strengthened the bargaining position of buyers at the expense of suppliers.
<ul style="list-style-type: none"> • The Canadian grocery retail sector has been growing in size and sales over the past five years. 	<ul style="list-style-type: none"> • Competition to get products into retail stores is fierce and expensive.
<ul style="list-style-type: none"> • Canadians are familiar with American food products. 	<ul style="list-style-type: none"> • Canadians are often loyal to local products, and strong provincial government programs help promote local agri-food industries.
<ul style="list-style-type: none"> • Computer software and electronic commerce used by retailers help create a direct working relationship between U.S. suppliers and Canadian retail outlets. 	<ul style="list-style-type: none"> • The investment in technology is substantial and the supplier must be able to meet shipping requirements quickly.
<ul style="list-style-type: none"> • Canadian consumers look for consistent quality and freshness when choosing food products. 	<ul style="list-style-type: none"> • There is a growing awareness and concern among Canadian consumers regarding food and biotechnology (including genetically modified organisms).

Section 6. Post Contact and Further Information

If you have any further questions or comments regarding this report, or require assistance exporting high value foods to grocery retail markets in Eastern Canada, please contact the U.S. Agricultural Affairs Office in Ottawa:

USDA/FAS Office of Agricultural Affairs
U.S. Embassy- Canada
Attn. Norval Francis, Jr. or Marilyn Bailey
P.O. Box 5000
Ogdensburg, NY 13669-0430

Tel: (613) 688-5267

Fax: (613) 688-3124

E-Mail: agottawa@fas.usda.gov or usagr@istar.ca

For more information on exporting U.S. agricultural products to foreign countries, please visit the Foreign Agricultural Service's Internet web site at www.fas.usda.gov.

Appendix A

Select Canadian Grocery Retail Chains Contact Information:

Loblaw Companies Ltd., Head Office

22 St. Clair Ave. E., Suite 1500

Toronto, ON M4T 2S8

tel: (416) 922-8500

fax: (416) 922-7791

Loblaw Brands Limited (Private Label Products)

22 St. Clair Ave. E., Suite 1800

Toronto, ON M4T 2S8

tel: (416) 922-8500

fax: (416) 960-6985

Sobeys Inc., Head Office

115 King St.

Stellarton, NS B0K 1S0

tel: (902) 752-8371

fax: (902) 752-2960

Sobeys Inc., Ontario Division

2701 Highpoint Dr.

Milton, ON L9T 5G5

tel: (905) 876-9953

fax: (905) 876-9949

The Great Atlantic & Pacific Co. of Canada Ltd.

5559 Dundas St. W

P.O. Box 68, Station A

Toronto, ON M5W 1A6

tel: (416) 239-7171

fax: (416) 234-6581

Metro-Richelieu Inc., Head Office

11011 Maurice Duplessis Blvd.

Montreal, PQ H1C 1V6

tel: (514) 643-1000

fax: (514) 643-1208

Couche-Tard Inc., Head Office

1600 Boul. Saint-Martin Est.

Tower B, Suite 280

Laval, PQ H7G 4S7

tel: (450) 662-6632

fax: (450) 662-7537

Avondale Stores Ltd.

North Service Rd.

Jordan Station, ON L0R 1S0

tel: (905) 562-4173

fax: (905) 562-4414

Hasty Market Corporation, Head Office

879 Cranberry Court

Oakville, ON L6L 6S7

tel: (905) 847-7373

fax: (905) 847-7931

Irving Convenience Stores, Head Office

P.O. Box 1421

Saint John, NB E2L 4K1

tel: (506) 632-2000

fax: (506) 644-3471

Imperial Oil, Head Office

111 St. Clair Ave. W.

Toronto, ON M5W 1K3

tel: (416) 968-4111

fax: (416) 968-5195

Silcorp Ltd.

10 Commander Blvd.

Scarborough, ON M1S 3T2

tel: (416) 291-4441

fax: (416) 291-4947

Appendix B

Select Eastern Canadian Regional Grocery Retail Chains Contact Information:

Co-op Atlantic, Head Office

123 Halifax St.

P.O. Box 750

Moncton, NB E1C 8N5

tel: (506) 858-6000

fax: (506) 858-6474

Commisso's Food Markets Ltd., Head Office

P.O. Box 760

Beamsville, ON L0R 1B0

tel: (905) 688-2112

fax: (905) 688-9387

Colemans Food Centres, Head Office

26 Caribou Rd.

P.O. Box 340

Corner Brook, NF A2H 6E8

tel: (709) 637-6600

fax: (709) 637-6696

Longo Brothers Fruit Markets Inc.

3767 Nashua Dr.

Mississauga, ON L4V 1R3

tel: (905) 673-3099

fax: (905) 673-1065

Knob Hill Farms Ltd., Head Office

1900 Eglinton Ave. E.

Scarborough, ON M1L 2L9

tel: (416) 751-2300

fax: (416) 751-2673

L&M Food Markets Ltd., Head Office

753 St. Andrew St.

Fergus, ON N1M3H2

tel: (519) 843-4470

fax: (519) 843-4650

Resources

- Agriculture and Agri-Food Canada Web Site, www.agr.ca
- Canadian Council of Grocery Distributors, Trends In Canada - 1998. (Montreal: Canadian Council of Grocery Distributors, 1998).
- Canadian Food Brokers Association Web Site, www.cfba.com
- Canadian Food Inspection Agency Web Site, www.cfia-acia.agr.ca
- Canadian Grocer Magazine, Who's Who 1999-2000 Annual Directory. Ed. George Condon. (Toronto: Maclean Hunter Publishing Ltd., 1999).
- Canadian Grocer Magazine, Canadian Grocer 1999 Executive Report. Ed. George Condon. (Toronto: Maclean Hunter Publishing Ltd., 1999).
- Canadian Produce Marketing Association Web Site, www.cpma.ca
- Department of Foreign Affairs and International Trade Web Site, www.dfait-maeci.gc.ca
- Food In Canada, September 1999. Ed. Kathryn Dorrell. (Toronto: Maclean Hunter Publishing Ltd., 1999).
- Produce Marketing Association Web Site, www.pma.com
- Statistics Canada Web Site, www.statcan.ca